



# **Getting Started with EPSS:**

## District Configuration Administrators

### RI Model

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## What is the EPSS?

The Educator Performance and Support System (EPSS) is an online statewide data system that will launch at the beginning of the 2012-13 school year. Funded by Rhode Island's Race to the Top Grant, the EPSS plays an important role in furthering RIDE's long-term commitment to support educator evaluation focused on professional growth and student learning.



The EPSS will capture all critical information associated with teacher and administrator evaluations and streamline the process for both educators and evaluators. For districts adopting the RI evaluation model(s), the EPSS will provide access to all forms, components, and scoring features required for implementation, as well as guidance to support the evaluation process.

## EPSS Configuration Overview

- EPSS user information will be imported from the RIDE Data Mart based upon elements derived from the Single Sign-On (SSO) configuration.
- RI Model Evaluation Types (e.g. Teacher, Building Admin Principal, and Building Admin non-Principal) and their related Criteria will be pre-configured based upon the user classifications derived from the RIDE Data Mart.
- The EPSS will be configured to automatically populate each building principal's evaluation caseload with all of the educators who are in their primary building (as per the information available within the DataMart on the configuration date).
- One of the first tasks for the District Configuration Administrator (see below) will be to assign evaluation caseloads to all non-Principal building administrators in the district.

## The Role of the District Configuration Administrator

Each LEA will identify a minimum of one District Configuration Administrator ("Config Admin") for the organization who will be assigned the right to modify and create caseloads within their district and the right to upload LEA level files.

The Config Admin will be the point person evaluators turn to if their caseload is missing a user or if they have a user incorrectly-assigned to their caseload (based on incorrect initial information from the RIDE Data Mart). The EPSS contains an Evaluation Rights wizard which will assist with these caseload assignments and modifications.

For planning purposes, the Config Admin may want to solicit information from building administrators prior to the start of each school year to determine the caseload creations needed for other evaluators. Initially, the only caseloads that will be pre-populated will be for the building principals. So any other district evaluators will need educators assigned to their caseloads.

## EPSS Dashboards Overview

### Educator Dashboard: My Evaluation Cycle (for anyone who is evaluated)



**1. Left Navigation Bar:** Folders with links to educator forms for review and/or completion and links to school-level and LEA-level reference documentation

**2. Evaluation Components Circle Graphic:** Clickable links to home pages for the three core components of the RI Model

**3. Calendar Graphic and Legend:** Quick snapshot of the month's scheduled evaluation elements with clickable dates to display a detailed calendar view

**4. Student Learning Objectives/ Professional Growth Plan:** Collapsible lists of approved Student Learning Objectives and Professional Growth forms such as the Self-Assessment and the Professional Growth Plan, respectively.

**5. Task List:** Will populate with the appropriate forms based on user type to allow access to all required RI Model tasks color-coded by Conference or Observation and sortable by status

## Evaluator Dashboard: My Caseload (for anyone assigned a caseload within EPSS)

**1. Left Navigation Bar:** This section contains two main categories: **REPORTS** and **SCHOOL INFO**. Under **REPORTS**, there are links for 'Caseload Detail View', 'Trend Explorer Reports', and 'Rubric Explorer Reports'. Under **SCHOOL INFO**, there is a link for 'Administrator Student Learning Objectives'.

**2. Evaluation Administration - Process View:** This section provides a high-level overview of all educators within an evaluator's purview. It includes filter options for Status (Any Status), Type (Any Type), Building, and Last Name. Below the filters is a table listing educators and their evaluation details.

Name	Evaluation Type	Evaluation Period	Progress	Status
Allippa, Dave	Teacher	08/01/2011-06/30/2012	0 of 9	In Progress
Ateer, Mark	Administrator	08/01/2011-06/30/2012	1 of 5	In Progress
Case, Tiffany	Administrator	08/01/2011-06/30/2012	0 of 6	In Progress
Chovey, Ann	Building Administrator	06/01/2012-06/30/2013	0 of 7	In Progress

Page 1 of 1. Displaying users 1 - 11 of 11.

**3. Evaluation Profile:** This section provides access to all components/forms within a teacher's evaluation cycle. It shows a detailed view for 'Allippa, Dave (RIDE\_Demo15 Teacher)' in Building: HS. The table below lists the components and their progress.

Component Name	Progress	Status
Beginning of Year: Teacher	0 of 5	In Progress
Classroom Observation #1	0 of 1	In Progress
Classroom Observation #2	0 of 1	Incomplete
Mid-Year: Teacher	0 of 1	In Progress
Classroom Observation #3	0 of 1	In Progress

- 1. Left Navigation Bar:** Links to EPSS reports and to school-level and LEA-level references uploaded by schools/ LEAs, and access to EPSS System Admin Tools for designated administrators
- 2. Process View:** High level status overview of all educators within an evaluator's purview with many filter and sort options
- 3. Evaluation Profile:** Access to all components/ forms within a teacher's evaluation cycle

## Evaluator Caseload Management

- Evaluators will use the **Process View** (located in the top half of the “My Caseload” tab) as a high level status overview of the educators within their purview.
- The Process View can be sorted using the drop-down filters, or an evaluator can search for a user by Last Name.
- Selecting a user in the Process View will reveal that user’s **Evaluation Profile** in the bottom half of the “My Caseload” tab. The Evaluation Profile shows all components and forms within that user’s evaluation cycle.
- From here, evaluators can schedule forms, complete forms, review educator-submitted forms, and finalize forms.
- These form actions are initiated by first expanding the relevant component (e.g. “Mid-Year: Teacher”) and then finding the desired form (e.g. “Teacher Mid-Year Conference”).
- Adjacent to the form’s **Status** (e.g. “Not Scheduled”) are three action icons: **Complete** the Form, **Schedule** the Form, and **Finalize** the Form.

The screenshot displays the 'Evaluation Administration - Process View' interface. The top section shows a list of educators with columns for Name, Evaluation Type, Evaluation Period, Progress, and Status. Below this, the 'Evaluation Profile' for 'Teacher, Jack' is shown, detailing various evaluation components like 'Beginning of Year: Teacher', 'Classroom Observation #1', 'Classroom Observation #2', 'Mid-Year: Teacher', 'Classroom Observation #3', and 'Professional Foundations'. Each component has a progress bar and a status (e.g., 'In Progress', 'Not Scheduled'). The 'Teacher Mid-Year Conference' form is highlighted with a red box, showing its status as 'Not Scheduled' and three action icons: a green checkmark (Complete), a calendar (Schedule), and a yellow star (Finalize).

### Remember:

- Until an evaluator is assigned at least one evaluatee, they will not see the “My Caseload” tab within EPSS.
- The EPSS will initially be configured to automatically populate each building principal’s evaluation caseload with all of the educators who are in their primary building (as per the information available within the RIDE DataMart on the configuration date).
- As the District Configuration Administrator, you will be the person evaluators turn to if their caseload is missing a user or if they have a user incorrectly-assigned to their caseload (based on incorrect initial information from the RIDE Data Mart).
- The EPSS contains an Evaluation Rights wizard which will assist with these caseload assignments and modifications.

## The ConfigAdmin Tab

As as District Configuration Administrator, you will see a tab within EPSS entitled “ConfigAdmin.” This area provides links to the tools and functions you have been given rights to in order to perform your role.

These functions are grouped into two categories: **Caseload Management** and **File Uploads**.



### Caseload Management

#### Evaluation Rights

Used to make evaluator/evaluatee assignments. For example, if a new teacher joins your district, you will need to give the principal of that teacher’s primary building the ability to participate in the teacher’s evaluation cycle.

### File Uploads

#### File Upload to School Info & LEA Info Sections

Brings you to the file upload utility, where the destination for uploaded files can be either “School Info” or “LEA Info.” This allows files to be visible in the Left Navigation Bar to all district EPSS users assigned to the building/school in question.

## Evaluation Rights Overview

Within EPSS, evaluators must be assigned the rights to participate in an individual's evaluation process. These rights can be assigned in one of two ways. The first is a blanket assignment, where you give the evaluator rights to all components and all forms for the selected individual(s). This blanket assignment is called **Evaluation Rights**, and is used most often.

Alternatively, these rights can be assigned at the more discrete component level. For example, you might be asked to give an evaluator rights for one specific component (e.g. Classroom Observation #2) in a teacher's evaluation process, but that evaluator should not be able to submit other forms, such as a Mid-Year Conference form. These targeted assignments are called **Component Rights**.

**IMPORTANT NOTE:** If both **Evaluation Rights** and **Component Rights** are assigned for a given evaluator, evaluate, and component, the **Evaluation Rights** will always trump or (over-write) any assigned **Component Rights**.

Furthermore, you also have the ability to grant **Submit (edit)**, **View**, or **Comment** rights on the component(s) in question. For example, an evaluator may request the ability to view and comment on a teacher's Classroom Observation component, but he/she is not the evaluator performing the observation and submitting the related forms. In that scenario, you might assign View and Comment rights, but *not* assign Submit rights.

## What to Ask Before Modifying Evaluation Rights

Since rights can be assigned in these different ways, it is important to fully understand what is being requested when you are asked to make a change. When an authorized district person asks you to add or change evaluation rights, here are some questions to ask:

***"Do you need the ability to participate in all components in this person's evaluation process? Or just one? If applicable, which components do you need to access?"***

***"Do you require the ability to submit the form(s), or is simply viewing the form(s) sufficient?"***














***"Do you need the ability to comment on the form(s) using the Comment feature?"***

(Note: The Comment feature allows the evaluator (and the evaluatee) to enter a note that is appended to the bottom of the form, and visible for the educator (or evaluator) to review. Submitting a Comment triggers an automatic email to the educator (or evaluator) with the Comment content in the body of the email. The system saves all comments with the associated date and time stamp.)



## Managing Evaluation Rights

1. From your EPSS dashboard, click on the **ConfigAdmin** tab.
2. Under the Caseload Management Section, select **Evaluation Rights**.
3. Click the **Add Evaluation Rights** button.
4. First the wizard will ask if you wish to make changes at the User, Building, or Department level.\* Typically you will make changes at the User Level (default). Make your selection and click **Next**.
5. Now select the evaluator(s) to whom you are assigning rights. Click **Next**.
6. Next select the user(s) you wish to add to the selected caseload(s). (Filter by building if desired.) Click **Next**.
7. Finally, select whether the evaluator should be given View, Comment, and/or Submit rights to this user. Click **Next**.
8. If you need to edit the assigned View, Comment, and/or Submit rights, click the **Edit** (pencil) icon for that row in the table.
9. If you need to delete an evaluator's Evaluation Rights, simply click the **Delete** (minus sign) icon for that row in the table.

Evaluation Rights			
Component Rights			
Admin: All Admins	User: All Users	Add Evaluation Rights	
Administrator	User	Rights	
<input type="checkbox"/> Abernethy, Sally	Berg, Jan	View, Comment, Submit	 
<input type="checkbox"/> Apple, Mary Ann	Berg, Jan	View, Comment, Submit	 
<input type="checkbox"/> Snow, Dan	Berg, Jan	View, Comment, Submit	 
<input type="checkbox"/> Robinson, Greg	Bogenschutz, Maureen	View, Comment, Submit	 
<input type="checkbox"/> Snow, Dan	Brooks, Reiko	View, Comment, Submit	 
<input type="checkbox"/> Apple, Mary Ann	Brooks, Reiko	View, Comment, Submit	 
<input type="checkbox"/> Abernethy, Sally	Brooks, Reiko	View, Comment, Submit	 

Choose the component rights level  
☐ User Level Rights  
☐ Building Level Rights  
☐ Department Level Rights

Next >



Choose the evaluator(s) to include

Last Name:

☐ Select All  
☐ Mark All  
☐ Include All

Page 1 of 1  
 Items 1 - 2 of 2  
 Next >



Choose the rights to include

☐ View  
☐ Comment  
☐ Submit

Next >



Choose the users to include

Last Name:

☐ Select All  
☐ Mark All  
☐ Include All

Page 1 of 1  
 Items 1 - 2 of 2  
 Next >

Evaluation Rights			
Component Rights			
Admin: All Admins	User: All Users	Add Evaluation Rights	
Administrator	User	Rights	
<input type="checkbox"/> Abernethy, Sally	Berg, Jan	View, Comment, Submit	 
<input type="checkbox"/> Apple, Mary Ann	Berg, Jan	View, Comment, Submit	 
<input checked="" type="checkbox"/> Snow, Dan	Berg, Jan	View, Comment, Submit	 
<input type="checkbox"/> Robinson, Greg		View, Comment, Submit	 
<input type="checkbox"/> Snow, Dan		View, Comment, Submit	 
<input type="checkbox"/> Apple, Mary Ann		View, Comment, Submit	 
<input type="checkbox"/> Abernethy, Sally		View, Comment, Submit	 
<input type="checkbox"/> Robinson, Greg		View, Comment, Submit	 

**Evaluation Rights**

Administrator: Snow, Dan

User: Berg, Jan

☒ View  
☒ Comment  
☒ Submit

Submit

\*Building level rights and Department level rights are used to assign rights for an entire building or department.

## Managing Component Rights

1. From your EPSS dashboard, click on the **ConfigAdmin** tab.
2. Under the Caseload Management Section, select **Component Rights**.
3. Click the **Add Component Rights** button.
4. First you will be prompted to select the components for which you would like to assign rights.
5. Next the wizard will ask if you wish to make changes at the User, Building, or Department level.\* Typically you will make changes at the User Level (default). Make your selection and click **Next**.
6. Now select the evaluator(s) to whom you are assigning rights. Click **Next**.
7. Next select the user(s) you wish to add to the selected caseload(s). (Filter by building if desired.) Click **Next**.
8. Finally, select whether the evaluator should be given View, Comment, and/or Submit rights to this user. Click **Next**.
9. If you need to edit the assigned View, Comment, and/or Submit rights, click the **Edit** (pencil icon) for that row in the table.
10. If you need to delete an evaluator's Component Rights, simply click the **Delete** (minus sign) icon for that row in the table.

Evaluation Rights			
Component Rights			
Component	Administrator	User	Rights
<input type="checkbox"/> Data Analysis: Teachers (Teach...	Combs, Elizabeth	Smith, Robert	View,Comment,Submit
<input type="checkbox"/> Data Analysis: Teachers (Teach...	Snow, Dan	Smith, Robert	View,Comment,Submit
<input type="checkbox"/> Observation Process #1: Teach...	Combs, Elizabeth	Smith, Robert	View,Comment,Submit
<input type="checkbox"/> Observation Process #1: Teach...	Snow, Dan	Smith, Robert	View,Comment,Submit

Choose the components to include

☐ Select All

☐ \*PER Documentation Cover Log (Chester Tansard)

☐ 1st Formal Observation (RI Innovation Teacher)

☐ 2nd Formal Observation (RI Innovation Teacher)

☐ Additional Observations (RI Educator)

☐ Beginning of Year (RI Educator)

☐ Beginning of Year Conference (Demot)

☐ Checklist Exit (Pares)

☐ Classroom Observation (Chester Tansard)

☐ CT Exit of Year Conference (CT Teacher)

☐ CT Goal Setting (CT Teacher)

Choose the component rights level

☒ User Level Rights

☐ Building Level Rights

☐ Department Level Rights

Choose the users to include

Last Name: Building: On

☐ Select All

☐ Malik, Ammar

☐ Hamilton, Jeremy

Choose the evaluator(s) to include

Last Name: Building: On

☐ Select All

☐ Malik, Ammar

☐ Hamilton, Jeremy

Choose the rights to include

☐ Right

☐ View

☐ Comment

☐ Submit

Evaluation Rights			
Component Rights			
Component	Administrator	User	Rights
<input type="checkbox"/> Classroom Observation #1 (Tea...	Admin, MLP	Admin, MLP	View,Comment,Submit
<input type="checkbox"/> Classroom Observation #1 (Tea...	Admin, MLP	Admin, MLP	View,Comment,Submit
<input type="checkbox"/> Classroom Observation #1 (Tea...	Admin, MLP	Admin, MLP	View,Comment,Submit
<input type="checkbox"/> Classroom Observation #1 (Tea...	Admin, MLP	Admin, MLP	View,Comment,Submit
<input type="checkbox"/> Classroom Observation #1 (Tea...	Admin, MLP	Admin, MLP	View,Comment,Submit

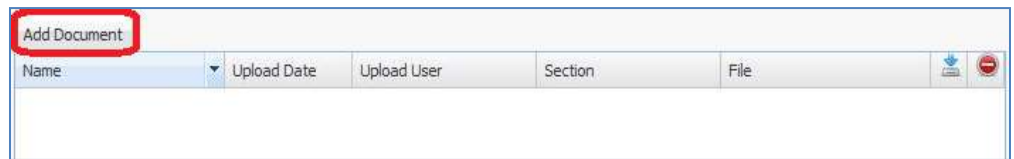
\*Building level rights and Department level rights are used to assign rights for an entire building or department.

## Uploading Files

To provide reference documents that support the evaluation process, files may be uploaded for access via either the School Level or the LEA Level sections of the Left Navigation Bar.

1. From your EPSS dashboard, click on the **ConfigAdmin** tab.
2. From your **Config Admin** tab, select **File Uploads**.
3. Click the **Add Document** button.

4. Enter a **Name** for the file.  
(This should be as short as possible since it will display as a link in the **Left Navigation Bar**.)

A screenshot of the 'Config Admin' interface showing the 'File Uploads' section. The 'Add Document' button is highlighted with a red rectangle. Below it is a table with columns: Name, Upload Date, Upload User, Section, and File. The 'Name' column has a dropdown arrow. There are also download and delete icons in the 'File' column.

5. Select which Section the file should be uploaded to: **School Level** or **LEA Level**.

A screenshot of the 'Add Document' dialog box. It has a title bar with 'Add Document' and a close button. Inside, there are three fields: 'Name:' with a text input, 'Section:' with a dropdown menu showing 'Select Section', and 'Document:' with a text input showing 'Select File' and a 'Browse...' button. At the bottom right are 'Upload' and 'Cancel' buttons.

6. **Browse** to locate the file.
7. Click the **Upload** button.

## Online EPSS Help Resources

### Within EPSS

Within EPSS, all users will always have a “Help” link in the top-right corner of the screen. This will launch the EPSS online help system. This support documentation knowledgebase features a context-sensitive search along with convenient buttons for quick access to online videos and manuals.

### Additional Information

For more information and to access training guides and videos, please visit RIDE’s official EPSS website:  
<http://www.ride.ri.gov/educatorquality/educatorevaluation/EPSS.aspx>